

INVITE US TO BE YOUR XERO ADVISOR

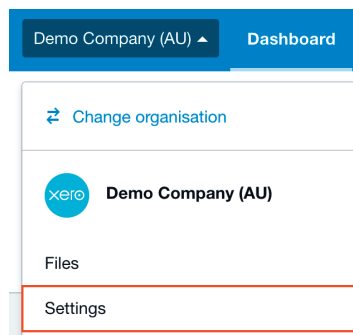
Thank you for engaging with AustAsia Accounting Services Pty Ltd. The next step is to invite us to become your Xero Adviser. As a Xero Certified Advisor and Partner we are fully qualified to manage all of your book keeping, tax and business processes. This saves time, reduces errors and lowers overall costs.

As your Xero Adviser we will:

- Review your financials in real time, managing the growth of your business and/or investments
- Ensure your Xero information and settings are in order
- Ensure your business and/or investments adhere to all compliance requirements

Inviting us to become your Xero advisor is easy. Simply follow the five steps outlined below.

1. In your Xero file, click on your **Xero entity name** on the top right of the menu bar, and select **Settings** from the dropdown menu.



2. In the **Organisation Settings** menu, select **Users**.

Organisation settings

General

Organisation details

Address, logo and basic financial information

Users

Add, remove or modify users of this organisation

Currencies

Manage the currencies your business uses

Connected Apps

Add and manage third party connections to Xero

3. In the **Users** menu, select **Invite a user**.

Users [Current users](#) [Login history](#)

[Remove Xero Support](#)

[Invite a user](#)

4. In the **Invite a User** menu, please enter the details below in the corresponding fields:

First Name: Simon

Last Name: Chesson

Email: bookkeeping@austasiagroup.com

Please tick **Payroll Admin** (this allows us to assist you with any payroll related matters)

Please tick **Business and accounting**, and select **Adviser**, then tick the following checkbox below.

- Bank account admin (this allows us to add and edit bank account details for customers and suppliers depending on your Xero subscription, and services required from AustAsia Accounting Services Pty Ltd).
- Manage users (this allows us to manage our practice staff access).

Then, click **Send invite**.

[Organisation settings](#) > [Users](#)
Invite a user

Enter their details

First name

Last name

Email

Give them access to:

Projects

Allow this user to access Projects. There may be a per active user cost. [Learn more](#)

Payroll admin

Allow this user full payroll access, including preparing and posting pay runs and payroll reporting

Business and accounting

How much access do they need?

Invoice only
Standard
Adviser
Read only

i This role has full access and includes advanced accounting features. It's ideal for accountants and bookkeepers. [Understand user role details](#)

Sales and purchases	✓
Bank accounts and balances	✓
Bank account admin	<input checked="" type="checkbox"/> Can add and edit bank account details held for customers and suppliers
Reports	✓
Publish reports	✓
Set lock dates	✓
Submit BAS	<input checked="" type="checkbox"/> Can send tax obligations to the government directly from Xero
Edit settings	✓
Manage users	<input checked="" type="checkbox"/> Can invite new users, edit user roles, and delete users

Cancel

Add a personal message

Send invite

If you require any assistance, please don't hesitate to ask. We're here to help.

Important information and disclaimer

This publication has been prepared by AustAsia Accounting Services Pty Ltd Registered Tax Agent No 7587 3005.

Any advice in this publication is of a general nature only and has not been tailored to your personal circumstances. Accordingly, reliance should not be placed on the information contained in this document as the basis for making any financial investment, insurance or other decision. Please seek personal advice prior to acting on this information.

Information in this publication is accurate as at the date of writing, 7 November 2018. In some cases the information has been provided to us by third parties. While it is believed the information is accurate and reliable, the accuracy of that information is not guaranteed in any way.

Opinions constitute our judgement at the time of issue and are subject to change. Neither the Licensee nor any member of AustAsia Group, nor their employees or directors give any warranty of accuracy, not accept any responsibility for errors or omissions in this document.

Any general tax information provided in this publication is intended as a guide only and is based on our general understanding of taxation laws. It is not intended to be a substitute for specialised taxation advice or an assessment of your liabilities, obligations or claim entitlements that arise, or could arise, under taxation law, and we recommend you consult with a registered tax agent.

How can we help you?



AustAsia Group
Business, Finance & Taxation Solutions

AustAsia House, 412 Newcastle Street, West Perth WA 6005

PO Box 332, Leederville WA 6903

T: (08) 9227 6300 **F:** (08) 9227 6400 **E:** clientservices@austasiagroup.com

www.austasiagroup.com

